Evaluation Summary Report (BIE)
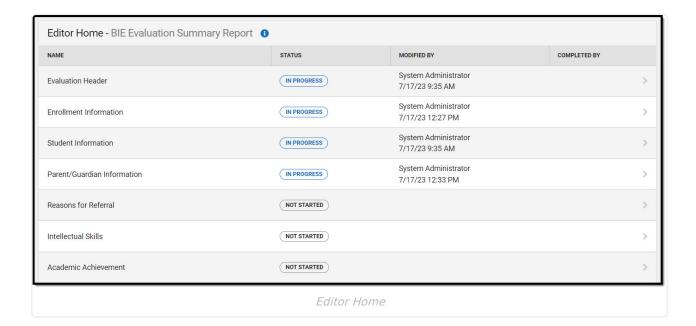
Last Modified on 07/24/2025 9:25 am CDT

Evaluation Header | Enrollment Information | Student Information | Parent/Guardian Information | Reasons for Referral | Intellectual Skills | Academic Achievement | Communication Skills | Physical/Medical | Motor Skills | Social, Emotional and Behavioral | Adaptive Skills | Hearing | Vision | Vocational | Developmental Delay | Classroom Observations | Other | Determination of Eligibility

Tool Search: Special Ed Documents

Evaluations are used to document the student's educational needs and determine eligibility for special education. This document describes each editor, the section(s) of the print format that includes the entered information, a description of each field on the editor, and any special considerations and instructions for using the editor and fields.

An evaluation must be created whether or not the student is determined to have a disability. The school district gives a copy of the evaluation summary report, including the documentation of eligibility, to the student's parents. For information on general functionality, navigation, and additional plan and evaluation features, see the core Plan and Evaluation Information article.
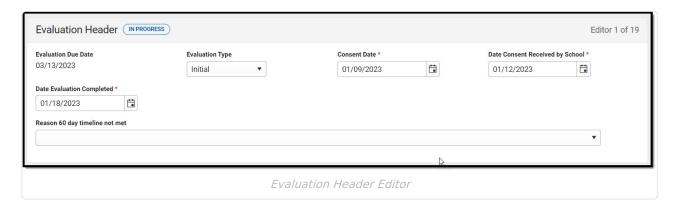
> The current format of this document is the **BIE Evaluation 2023**. Evaluation formats are selected in the Eval Types tool.

NAME	STATUS	MODIFIED BY	COMPLETED BY	
Evaluation Header	IN PROGRESS	System Administrator 7/17/23 9:35 AM		>
Enrollment Information	IN PROGRESS	System Administrator 7/17/23 12:27 PM		>
Student Information	IN PROGRESS	System Administrator 7/17/23 9:35 AM		>
Parent/Guardian Information	IN PROGRESS	System Administrator 7/17/23 12:33 PM		>
Reasons for Referral	NOT STARTED			>
Intellectual Skills	NOT STARTED			>
Academic Achievement	NOT STARTED			>

Editor Home

Evaluation Header

The Evaluation Header editor lists general information about the Evaluation.

Evaluation Header Editor

▸ Click here to expand...

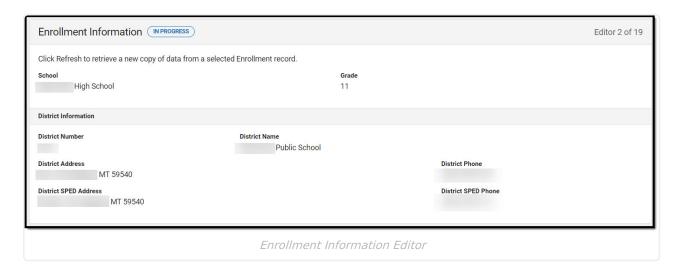| Field	Description	Validation
Evaluation Due Date	A day 60 days from the date consent to evaluate the student for special education services is received.	This field auto-populates to a date 60 days from the date entered in the Date Consent Received by School field. This field is read-only.
Date Evaluation Completed *Required*	The day the evaluation is completed.	N/A
Evaluation Type	The type of evaluation. Options include: • Initial • Reevaluation	N/A
Consent Date *Required*	The day the consent is sent to the student's parent/guardian.	N/A
Date Consent Received by School *Required*	The day the school received consent from the student's parent/guardian to evaluate the student for special education services.	The date entered in this field automatically calculates to a date 60 days in the future. When a date is entered here, the Evaluation Due Date auto-populates.
Date Evaluation Completed *Required*	The day the evaluation was completed for the student.	N/A

Field	Description	Validation
Reason 60 day timeline not met	The explanation for why the evaluation was not completed within the 60 day timeline. Options include: • Parent repeatedly fails or refuses to make child available for evaluation • Child transfers to new school after previous school has begun and evaluation is not completed (child no longer under the jurisdiction of the school) • Contract not awarded • Inclement weather • Evaluator not available • Other	This field does not print.

Enrollment Information

The Enrollment Information editor reports Special Education information from the student's Enrollment.

The **Refresh** button retrieves a fresh copy of data from the student's record.

Enrollment Information   IN PROGRESS   Editor 2 of 19

Click Refresh to retrieve a new copy of data from a selected Enrollment record.

School   High School   Grade   11

District Information

District Number   District Name   Public School

District Address   MT 59540   District Phone

District SPED Address   MT 59540   District SPED Phone

Enrollment Information Editor

▶ Click here to expand...

Field	Description	Location (when Refresh is clicked)
School	The name of the school associated with the student's Enrollment record.	Student Information > General > Enrollments > School
Grade	The student's current grade.	Student Information > General > Enrollments > Grade Enrollment.grade
District Information		
District Number	The district number associated with the Enrolled school.	System Administration > Resources > District Information > State District Number
District Name	The district name associated with the Enrolled school.	System Administration > Resources > District Information > Name
District Address	The district address associated with the Enrolled school.	System Administration > Resources > District Information > Address
District Phone	The district phone number associated with the Enrolled school.	System Administration > Resources > District Information > Phone
District SPED Address	The district special education address associated with the Enrolled school.	System Administration > Resources > District Information > SPED Address
District SPED Phone	The district special education phone number associated with the Enrolled school.	System Administration > Resources > District Information > SPED Phone

Student Information

The Student Information editor displays basic information about the student such as demographic information. This is a read-only editor.

The **Refresh** button retrieves a fresh copy of data from the student's record.

Student Information Editor

▶ Click here to expand...

Field	Description	Location (when Refresh is clicked)
Last Name	The student's last name.	Census > People > Demographics > Last Name identity.lastName
First Name	The student's first name.	Census > People > Demographics > First Name identity.firstName
Middle Name	The student's middle name.	Census > People > Demographics > Middle Name identity.middleName
Suffix	The student's suffix.	Census > People > Demographics > Suffix Name identity.suffix
Race/Ethnicity	The student's state defined race.	Census > People > Demographics > State Race/Ethnicity
Birthdate	The student's birthdate.	Census > People > Demographics > Birth Date identity.birthDate
Age	The student's age.	Census > Person Information > Age

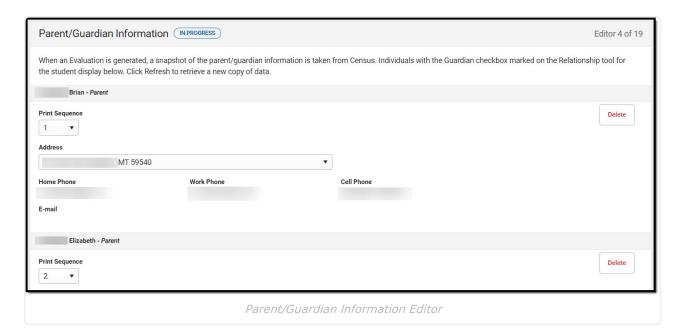| Field	Description	Location (when Refresh is clicked)
Address	The student's address. This field becomes a dropdown when more than one address exists for the student. The primary household displays by default.	Census > Households > Address Info address.number; address.street; address.tag; address.prefix; address.dir; address.apt; address.city; address.state; address.zip
Primary Language	The student's first language.	Census > People > Demographics > Home Primary Language identity.homePrimaryLanguage
NASIS ID	The student's state ID number.	Census > People > Demographics > NASIS ID
Case Manager Information		
Name	The first and last name of the team member.	Student Information > Special Ed > General > Team Members
Title	The role of the team member.	Student Information > Special Ed > General > Team Members
Phone	The phone number of the team member.	Student Information > Special Ed > General > Team Members

Parent/Guardian Information

The Parent/Guardian Information editor populates based on the guardian checkbox on the student's Relationships tool. The editor includes Demographics information for the student's guardian.

The **Delete** button next to each parent/guardian can be used to remove a parent/guardian from the IEP.

The **Refresh** button retrieves a new copy of parent/guardians' data. This also returns any accidentally deleted people. Manually entered fields do not change when the refresh button is clicked. The user must **Save** after clicking Refresh to capture changes.

Parent/Guardian Information Editor

▶ Click here to expand...

Field	Description	Validation
Last Name	The last name of the parent/guardian.	This field populates from Census. This is part of the header for the parent/guardian.
First Name	The first name of the parent/guardian.	This field populates from Census. This is part of the header for the parent/guardian.
Middle Name	The middle name of the parent/guardian.	This field populates from Census. This is part of the header for the parent/guardian.
Suffix	The suffix of the parent/guardian.	This field populates from Census. This is part of the header for the parent/guardian.
Relationship	The relation of the parent/guardian to the student.	This field populates from Census. This is part of the header for the parent/guardian.
Print Sequence	The print order of the parent/guardian(s) on the IEP.	When no Sequence is selected, parent/guardian(s) print in the order displayed in the UI. When any Sequences are selected, parent/guardian(s) with a sequence number prints in the order defined. Unordered parent/guardians display below the sequenced records.

Field	Description	Validation
Address	The parent/guardians' address.	This field populates from Census > Household > Addresses. When there are multiple addresses for a person, the drop down with an option to select which address displays. When there is only one address, the drop down only has one option. The populated address is the one marked Primary.
Home Phone	The home phone number of the parent/guardian.	This field populates from Census > Personal Contact Information > Household Phone.
Work Phone	The work phone of the parent/guardian.	This field populates from Census > People > Demographics > Work Phone.
Cell Phone	The cell phone of the parent/guardian.	This field populates from Census > Personal Contact Information > Cell Phone.
Email	The primary email address for the parent/guardian.	This field populates from Census > Personal Contact Information > Email.

Reasons for Referral

The Reasons for Referral editor is used to document the reasons the parent/guardian(s) and/or school personnel referred the student for an evaluation.

Reasons for Referral NOT STARTED   Editor 5 of 19

Parent Information
Reasons for Referral, Parents, School Personnel

Reasons for Referral Editor

Intellectual Skills

The Intellectual Skills editor is used to document the student's current level of intellectual development.

Current Intellectual Assessment Results

Intellectual Information 📄

Intellectual Skills Editor

Academic Achievement

The Academic Achievement editor is used to document the student's current level of academic achievement in the classroom.

Academic Achievement NOT STARTED   Editor 7 of 19

Current Academic Achievement Assessment Results

Academic Information 📄

Academic Achievement Editor

Communication Skills

The Communication Skills editor is used to document the student's current level of communication skills.

Communication Skills NOT STARTED   Editor 8 of 19

Current Communication Skills Assessment Results

Communication Information 📄

Communication Skills Editor

Physical/Medical

The Physical/Medical editor is used to document the student's physical and medical health.

Physical/Medical NOT STARTED	Editor 9 of 19

Current Physical/Medical Assessment Results
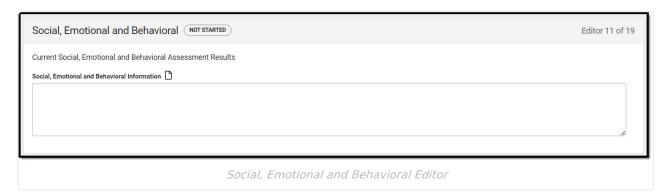
Physical/Medical Information 📄

Physical/Medical Editor

Motor Skills

The Motor Skills editor is used to document the student's current level of movement and motor ability.

Motor Skills NOT STARTED	Editor 10 of 19

Current Gross and/or Fine Motor Skills Assessment Results

Gross and/or Fine Motor Skills 📄

Motor Skills Editor

Social, Emotional and Behavioral

The Social, Emotional and Behavioral Skills editor is used to document the student's current level of emotional and behavioral abilities.

Social, Emotional and Behavioral NOT STARTED	Editor 11 of 19

Current Social, Emotional and Behavioral Assessment Results

Social, Emotional and Behavioral Information 📄

Social, Emotional and Behavioral Editor

Adaptive Skills

The Adaptive Skills editor is used to document the student's current level of adaptive skills.

Adaptive Skills NOT STARTED	Editor 12 of 19

Current Adaptive Skills Assessment Results

Adaptive Skills 📄

Adaptive Skills Editor

Hearing

The Hearing editor is used to document the student's hearing abilities.

Hearing NOT STARTED	Editor 13 of 19

Current Hearing Assessment Results

Hearing 📄

Hearing Editor

Vision

The Vision editor is used to document the student's visual abilities.

Vision NOT STARTED	Editor 14 of 19

Current Vision Assessment Results

Vision 📄

Vision Editor

Vocational

The Vocational editor is used to document the student's vocational skills.

Vocational NOT STARTED	Editor 15 of 19

Current Vocational Assessment Results

Vocational 📄

Vocational Editor

Developmental Delay

The Developmental Delay editor is used to document any delays to the student's development.

Developmental Delay NOT STARTED	Editor 16 of 19

Current Developmental Delay Assessment Results

Developmental Delay 📄

Developmental Delay Editor

Classroom Observations

The Classroom Observations editor is used to describe the student's performance in the classroom.

Classroom Observations NOT STARTED	Editor 17 of 19

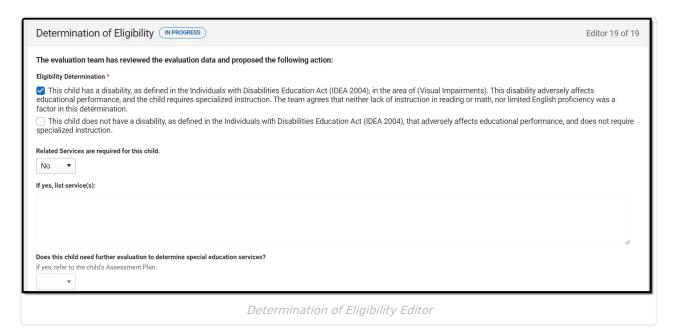**Classroom Observations** 📄

Classroom Observations Editor

Other

The Other editor is used to document any additional information pertinent to the evaluation of the student for a determination of eligibility.

Other Editor

Determination of Eligibility

The Determination of Eligibility editor is used to document the team's decision regarding the action needed for the student based on all the data collected in the previous editors.

Determination of Eligibility Editor

▶ Click here to expand...

Field	Description	Validation

Field	Description	Validation
Eligibility Determination *Required*	The determination of the team. Options include: • This child has a disability, as defined in the Individuals with Disabilities Education Act (IDEA 2004), in the area of (select Primary Disability below). This disability adversely affects educational performance, and the child requires specialized instruction. The team agrees that neither lack of instruction in reading or math, nor limited English proficiency was a factor in this determination. • This child does not have a disability, as defined in the Individuals with Disabilities Education Act (IDEA 2004), that adversely affects educational performance, and does not require specialized instruction.	Only one option can be selected. When a user selects a primary disability, the disability populates to (Select Primary Disability Below).
Related Services are required for this child.	Indicates the student requires related services. Options are Yes or No.	N/A
If yes, list service(s) *Required*	A description of the services required.	*This field is available and required when Yes is selected for "Related Services are required for this child."
Does this child need further evaluation to determine special education services? *Required*	Options are Yes or No.	*This field is available when No is selected for the Eligibility Determination question.

Field	Description	Validation
Primary Disability **Required*	The student's primary disability. Options include: • Intellectual Disabilities • Hearing Impairments/Deafness • Speech or Language Impairments • Visual Impairments • Emotional Disturbance • Orthopedic Impairments • Other Health Impairments • Specific Learning Disabilities • Deaf/Blindness • Multiple Disabilities • Autism • Traumatic Brain Injury • Developmental Delay	*This field is required when users selects the check box for "This child has a disability..." and is unavailable when "This child does not have a disability..." is selected.
Determination of Eligibility Date *Required*	The day the team made the eligibility determination decision.	This field always displays on print. **Ad hoc inquiries:** evaluation.determinationDate

Previous Versions

Evaluation Summary Report (BIE) [.2327 and previous]